



JULIE GOODRUM

Risk Management & Oversight
Corporate Transformation
Merger & Acquisitions
Succession Planning
Process Design & improvement

Relevant experience

Wealth Enhancement Group, formerly
Cardan Capital Partners, 2018-present

Private Capital Management, formerly
Wagner Wealth Management, 2011-2018

Goodrum Consulting 2003-2011

Cambiar Investors 1996-2003

Merrill Lynch 1991-1996

Credentials

MS Marketing, University of Colorado

BS Finance, Arizona State University

Boardbound by Women's Leadership
Foundation program, 2022-2023 Cohort

Contact

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An engaged corporate leader seeking a corporate board position. With over 30 years of experience in the financial services industry including wealth management, brokerage, institutional money management and private wealth strategies, Julie has proven success in board engagement, leadership through transition and crisis, managing corporate risk and improving employee engagement and corporate profitability.

With over 10 years of experience as a C-Suite leader, Julie has held Chief Operations and Chief Compliance Officer positions. She has played an integral role in financial management, firm strategy, risk management, corporate branding and leading the executive committee. Julie has led two companies through the merger and acquisition process, one as an equity owner, and the subsequent integration post transaction.

As a Chief Compliance Officer, Julie developed risk evaluation and oversight programs to align with fiduciary responsibilities and regulatory requirements. As a Chief Operations Officer and Operations Director, Julie has focused on organizational restructure, process enhancements and technological adoption to drive efficiency and corporate profit.

Julie has served two terms on Charles Schwab's Technology, Operations, & Service (TOS) Board. Additionally, she has participated in presenting to large corporate, endowment, foundation, and Taft-Hartley boards. Currently, Julie leads a multi-disciplinary team focused on supporting M&A activity including due diligence, integration planning, and acquisition team training.

Julie has a passion for the solving complex problems and coaching individuals and teams to their full potential while managing short term pressures and long-term goals. This passion is also reflected in her community engagement. Julie currently serves on the Finance Committee for Girl's Inc. of Metro Denver and has served two terms as Board Member and Finance Committee Member for Karis Community. She is also a participant in the 2022-2023 cohort of the Boardbound by Women's Leadership Foundation program.